

## CLAIMS

What is claimed is:

1. A method for managing recommendations using a computer system, comprising:

5 receiving survey information from an individual serving a first role pertaining to an aspect of an organizational entity, the survey information including at least one recommendation;

storing the survey information;

10 receiving, via a user interface, first recommendation information from an individual serving a second role, the first recommendation information being based on the survey information received from the individual serving the first role;

storing the recommendation information;

15 receiving, via the user interface, second recommendation information from an individual serving a third role, the second recommendation information being based on the first information received from the individual serving the second role;

storing the second recommendation information; and

addressing said at least one recommendation based on the first and second recommendation information.

20 2. The method according to claim 1, wherein the individual serving the first role, the individual serving the second role, and the individual serving the third role are different individuals.

25 3. The method according to claim 1, wherein the individual serving the first role is a field consultant who serves the role of inspecting the organizational entity to determine whether it satisfies a defined criterion.

4. The method according to claim 3, wherein the defined criterion pertains to safeguards against property loss within the organizational entity, and said at least one recommendation pertains to a measure designed to reduce property loss.

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5. The method according to claim 1, wherein the individual serving the second role is a risk manager who serves the role of evaluating and addressing risk-related issues associated with the organizational entity.

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6. The method according to claim 1, wherein the individual serving the second role is a facility manager who serves the role of coordinating the implementation of risk-reduction measures within a facility.

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7. The method according to claim 1, wherein the individual serving the third role is a risk manager who serves the role of evaluating and addressing risk-related issues associated with the organizational entity.

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8. The method according to claim 1, wherein the individual serving the third role is a facility manager who serves the role of coordinating the implementation of risk-reduction measures within a facility.

9. The method according to claim 1, wherein the organizational entity is a business having multiple facilities.

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10. The method according to claim 1, wherein the receiving of the first recommendation information from the individual serving the second role and the

receiving of second recommendation information from the individual serving the third role comprises sequentially providing a recommendation response report to the individual serving the second role and then to the individual serving the third role via the user interface, wherein the recommendation response report includes input fields  
 5 for receiving the first recommendation information from the individual serving the second role and from the second recommendation information from the individual serving the third role.

11. The method according to claim 10, wherein the user recommendation  
 10 report includes a first section for receiving the first recommendation information from the individual serving the second role and a second section for receiving the second recommendation information from the individual serving the second role.

12. The method according to claim 1, wherein the receiving of first  
 15 recommendation information from the individual serving the second role comprises receiving at least one of: intent information which conveys instructions of the individual serving the second role; and comment information provided by the individual serving the second role.

20 13. The method according to claim 1, wherein the receiving of second recommendation information from the individual serving the third role comprises receiving at least one of: intent information which conveys the response of the individual serving the third role to instructions of the individual serving the second role; and comment information provided by the individual serving the third role.

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14. The method according to claim 1, further including receiving a target date associated with the implementation of said at least one recommendation.

15. The method according to claim 14, further including receiving status  
5 information pertaining to the target date.

16. The method according to claim 1, wherein the user interface includes at least one field having a visual attribute that conveys a level of urgency associated with said at least one field.

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17. The method according to claim 16, wherein said at least one field pertains to a target date field, and the visual attribute is color.

18. The method according to claim 1, further including sending a notification  
15 from the individual serving the second role to at least the individual serving the third role after the first recommendation information is received from the individual serving the second role.

19. The method according to claim 1, further including sending a reminder  
20 notification to at least the individual serving the third role if the individual serving the third role fails to enter the second recommendation information within a predetermined period of time.

20. The method according to claim 19, wherein the predetermined period of  
25 time is measured with respect to a time when the individual serving the second role entered the recommendation information.

21. The method according to claim 19, wherein the predetermined period of time is measured with respect to a specified target date pertaining to the implementation of said at least one recommendation.

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22. The method according to claim 19, further including sending another reminder notification if the individual serving the third role fails to respond to the first-mentioned reminder notification, the other reminder notification conveying greater urgency compared to the first-mentioned reminder notification.

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23. The method according to claim 19, further including customizing at least one of: a timing at which the reminder notification is to be transmitted; an identity of at least one recipient who is to receive the reminder notification; information content of the reminder notification; and a style of the reminder notification.

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24. The method according to claim 1, wherein, in a top-down mode of process flow, the individual serving the second role serves an overseeing role with respect to the individual serving the third role.

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25. The method according to claim 1, wherein, in a bottom-up mode of process flow, the individual serving the third role serves an overseeing role with respect to the individual serving the second role.

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26. The method according to claim 1, wherein, in a top-down mode of process flow, the individual serving the second role serves an overseeing role with respect to the individual serving the third role, and, in a bottom-up mode of process flow, the

individual serving the third role serves an overseeing role with respect to the individual serving the second role, and, in a no-flow mode of process flow, either the individual serving the second role or the individual serving the third role can enter recommendation information first, and the method further includes allowing a user to  
5 define whether the method is to operate in the top-down mode or the bottom-up mode or a no-flow mode.

27. The method according to claim 1, further including providing a listing that identifies a historical sequence of information entered by the individual serving the  
10 first role, the individual serving the second role, and the individual serving the third role.

28. The method according to claim 1, further including filtering received survey information and recommendation information based on at least one selected  
15 criterion.

29. The method according to claim 1, further including sorting received survey information and recommendation information based on at least one selected criterion.

20 30. The method according to claim 1, further including printing received survey information and recommendation information in a selected report format.

31. The method according to claim 1, further including exporting received survey information and recommendation information into a selected export file  
25 format.

32. A computer readable medium including machine readable instructions for implementing the method of claim 1.

33. A recommendation management module for managing recommendations,  
5 comprising:

logic configured to receive survey information from an individual serving a first role pertaining to an aspect of an organizational entity, the survey information including at least one recommendation;

logic configured to store the survey information;

10 logic configured to receive, via a user interface, first recommendation information from an individual serving a second role, the first recommendation information being based on the survey information received from the individual serving the first role;

logic configured to store the first recommendation information;

15 logic configured to receive, via the user interface, second recommendation information from an individual serving a third role, the second recommendation information being based on the first recommendation information received from the individual serving the second role; and

logic configured to store the second recommendation information.

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34. The recommendation management module according to claim 33, wherein the individual serving the first role, the individual serving the second role, and the individual serving the third role are different individuals.

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35. The recommendation management module according to claim 33, wherein the logic for receiving the first recommendation information from the individual

serving the second role and the logic for receiving the second recommendation information from the individual serving the third role comprises logic configured to sequentially provide a recommendation response report to the individual serving the second role and then to the individual serving the third role via the user interface,  
5 wherein the recommendation response report includes input fields for receiving the first recommendation information from the individual serving the second role and the second recommendation information from the individual serving the third role.

36. The recommendation management module according to claim 35, wherein  
10 the recommendation response report includes a first section for receiving the first recommendation information from the individual serving the second role and a second section for receiving the second recommendation information from the individual serving the third role.

15 37. The recommendation management module according to claim 33, wherein the logic for receiving the first recommendation information from the individual serving the second role is configured to receive at least one of: intent information which conveys instructions of the individual serving the second role; and comment information provided by the individual serving the second role.

20 38. The recommendation management module according to claim 33, wherein the logic for receiving the second recommendation information from the individual serving the third role is configured to receive at least one of: intent information which conveys the response of the individual serving the third role to instructions of the  
25 individual serving the second role; and comment information provided by the individual serving the third role.



39. The recommendation management module according to claim 33, further including logic configured to receive a target date associated with the implementation of said at least one recommendation.

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40. The recommendation management module according to claim 39, further including logic configured to receive status information pertaining to the target date.

41. The recommendation management module according to claim 33, wherein  
10 the user interface includes at least one field having a visual attribute that conveys a level of urgency associated with said at least one field.

42. The recommendation management module according to claim 41, wherein  
said at least one field pertains to a target date field, and the visual attribute is color.

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43. The recommendation management module according to claim 33, further including logic configured to send a notification from the individual serving the second role to at least the individual serving the third role after the first recommendation information is received from the individual serving the second role.

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44. The recommendation management module according to claim 33, further including logic configured to send a reminder notification to at least the individual serving the third role if the individual serving the third role fails to enter the second recommendation information within a predetermined period of time.

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45. The recommendation management module according to claim 44, wherein the predetermined period of time is measured with respect to a time when the individual serving the second role entered the first recommendation information.

5           46. The recommendation management module according to claim 44, wherein the predetermined period of time is measured with respect to a specified target date pertaining to the implementation of said at least one recommendation.

10           47. The recommendation management module according to claim 44, wherein logic for sending a reminder notification is further configured to send another reminder notification if the individual serving the third role fails to respond to the first-mentioned reminder notification, the other reminder notification conveying greater urgency compared to the first-mentioned reminder notification.

15           48. The recommendation management module according to claim 44, further including logic configured to customize at least one of: a timing at which the reminder notification is to be transmitted; an identity of at least one recipient who is to receive the reminder notification; information content of the reminder notification; and a style of the reminder notification.

20           49. The recommendation management module according to claim 33, wherein, in a top-down mode of process flow, the individual serving the second role serves an overseeing role with respect to the individual serving the third role, and, in a bottom-up mode of process flow, the individual serving the third role serves an overseeing  
25           role with respect to the individual serving the second role, and, in a no-flow mode of process flow, either the individual serving the second role or the individual serving

the third role can enter recommendation information first, and the recommendation management module further includes logic configured to allow a user to define whether a process flow is to operate in the top-down mode or the bottom-up mode or the no-flow mode.

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50. The recommendation management module according to claim 33, further including logic configured to provide a listing that identifies a historical sequence of recommendation information received from the individual serving the first role, the individual serving the second role, and the individual serving the third role.

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51. The recommendation management module according to claim 33, further including logic configured to filter received survey information and recommendation information based on at least one selected criterion.

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52. The recommendation management module according to claim 33, further including logic configured to sort received survey information and recommendation information based on at least one selected criterion.

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53. The recommendation management module according to claim 33, further including logic configured to print received survey information and recommendation information in a selected report format.

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54. The recommendation management module according to claim 33, further including logic configured to export received survey information and recommendation information into a selected export file format.

55. A computer readable medium including machine readable instructions for implementing recommendation management module of claim 33.

56. A system for managing recommendations using a computer system,  
5 comprising:

a plurality of computer devices available to an individual serving a first role, an individual serving a second role, and an individual serving a third role;

processing functionality communicatively coupled to the plurality of computer devices via a network, wherein the processing functionality includes:

10 a database storage;

a recommendation management module including:

logic configured to receive, via one of the computer devices, survey information from the individual serving the first role pertaining to an aspect of an organizational entity, the survey information  
15 including at least one recommendation;

logic configured to store the survey information in the database storage;

logic configured to receive, via a user interface provided on one of the computer devices, first recommendation information from the  
20 individual serving the second role, the recommendation information being based on the survey information received from the individual serving the first role;

logic configured to store the first recommendation information in the database storage;

25 logic configured to receive, via the user interface provided on one of the computer devices, second recommendation information

from the individual serving the third role, the second recommendation information being based on the first recommendation information received from the individual serving the second role; and

5                   logic configured to store the second recommendation information in the database storage.

57. The system according to claim 56, wherein the individual serving the first role, the individual serving the second role, and the individual serving the third role are different individuals.

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58. A computer device for presenting a user interface display for managing recommendations, comprising:

logic configured to present a first input section dedicated to receiving first recommendation information from an individual serving a first role;

15                   logic configured to receive the first recommendation information from the individual serving the first role;

logic configured to present a second input section dedicated to receiving second recommendation information from an individual serving a second role; and

20                   logic configured to receive the second recommendation information from the individual serving the second role.

59. The computer device according to claim 58, wherein the individual serving the first role and the individual serving the second role are different individuals.

25                   60. The computer device according to claim 58, wherein the logic for presenting the first input section and the logic for presenting the second input section

are configured to present a recommendation response report including the first section and second section as parts thereof.

61. The computer device according to claim 58, wherein the first section  
5 includes input fields for receiving at least one of: intent information which conveys instructions of the individual serving the first role; and comment information provided by the individual serving the first role.

62. The computer device according to claim 58, wherein the second section  
10 includes input fields for receiving at least one of: intent information which conveys a response of the individual serving the second role to instructions of the individual serving the first role; and comment information provided by the individual serving the second role.

15 63. The computer device according to claim 58, wherein the second section includes an input field for receiving a target date which conveys a date associated with the implementation of a recommendation.

64. The computer device according to claim 63, wherein second section  
20 further includes an input field for receiving status information pertaining to the target date.

65. The computer device according to claim 63, wherein the target date  
25 includes a visual attribute that conveys a level of urgency associated with the target date.

66. The computer device according to claim 65, wherein the visual attribute is color.

67. The computer device according to claim 58, further including logic  
5 configured to display a listing that identifies a historical sequence of recommendation information entered by the individual serving the first role and the individual serving the second role.

68. A computer readable medium including machine readable instructions for  
10 implementing each of the logic of claim 58.